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Foreign Crops and MARKETS



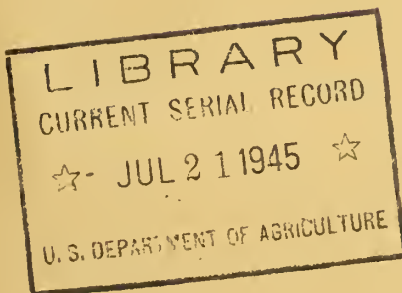
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L A T E C A B L E S

Danish crop conditions on June 30 in percent of normal, corresponding percentages for last year shown in parenthesis, were announced as follows: Wheat, 95 (100); rye, 91 (98); barley, 96 (99); oats, 96 (97); mixed grain, 96 (98); legumes, 98 (97); potatoes, 94 (90); mangels, 88 (78); fodder sugar beets, 89 (79); rutabagas, 95 (92); turnips, 94 (91); carrots, 91 (90); sugar beets for feed, 90 (79); sugar beets for sugar, 93 (87); lucerne hay, 97 (95); sown hay, 102 (110); wild hay, 92 (95); and pastures, 100 (108).

Argentina's exportable surplus of sunflower seed oil from the 1944-45 crop has been tentatively estimated at 121,000 to 132,000 short tons. The 1944-45 crop is estimated to be the same or slightly smaller than that of last year (1943-44) which now appears to have been about 965,000 short tons.

Climatic extremes of drought and rain have seriously affected Chilean agriculture. Much of Chile north of the 36th latitude has suffered greatly from drought, whereas south of Talca excessive rains have caused widespread floods which damaged fields, roads, and bridges. In the dry area, large numbers of livestock have died, with lamb casualties particularly high, because of lack of pasturage, and many farmers had to replant wheat several times because of lack of moisture for germination. The second lowest temperature in sixty years was recorded in Santiago recently when the thermometer dropped to 4.2 C. below zero.

Bulgaria has been afflicted by severe drought, its worst since 1928. Extreme dryness has resulted both from lack of rain this summer, and the lightness of the snowfall last winter. The water table reached the minimum by the end of May, instead of the end of July, the usual date. A Bulgarian Ministry of Agriculture report regarding severity of the drought did not mention crop prospects.

Canadian crops made fair progress during the first week of July, with rain in the Prairie Provinces and the Maritimes. Warm weather improved prospects in the Maritimes, but it was estimated 10 percent of intended acreage would not be seeded. The hay crop was good, but apple prospects poor.

Quebec and Ontario grain crops were doing well, with haying in full swing in both Provinces. Wheat yields were expected to be generally excellent but late sown crops were backward. Warmer weather was needed in Manitoba, though crops were doing well. The southwestern half of Saskatchewan was dry with poor yields in prospect, but the northeastern half had good, but late, crops. Conditions were excellent in southwestern Alberta, but the central part of the Province still needed rain. Hail damage has been extensive between Olds and Medicine Hat. Peace River conditions were good, and apple picking was under way in British Columbia.

CANADA REIMPOSES MEAT RATIONING TO INCREASE AVAILABLE EXPORT SUPPLIES 1/

Consumer rationing of meats will be re-introduced in Canada as soon as necessary purchase coupons can be distributed, according to an announcement by the Canadian Government on July 6, in order to minimize the effect of reductions in domestic output on export supplies available for the United Kingdom and liberated European countries. Proposed rationing program will restrict meat consumption to a greater extent than the former program discontinued in February 1944. Until coupons are issued, the Prime Minister has asked consumers to make voluntary reduction in their rate of meat consumption. All meats, except poultry, will be rationed. Immediate control is being imposed over all commercial slaughterings. In restaurants and other eating places, meatless days will be enforced on Tuesdays and Fridays, commencing July 13. In lieu of rationing the Canadian Government in recent months has been requisitioning meat at inspected packing plants to obtain supplies for export and to restrict domestic consumption.

Output of meat in Canada in 1945 from inspected slaughter is expected to be 11 percent below 1944 while total production will show a decrease of 6 percent. This reduction is indicated by a drop of 35 percent in inspected hog slaughter during the first half year which has not been offset by a 27 percent increase in cattle and calf slaughter. Lower hog slaughter reflects the reduced farrowings in 1944.

In recent weeks slaughterings in inspected plants, normally accounting for about three-fourths of total Canadian slaughter and from which the Government obtains meat for export, have shown a sharp downward trend. This reduction in slaughterings, coming at a time of heavily increased meat demands in connection with troop movements and for ships' stores, has resulted in further decreased supplies available for export. The producing countries of Canada, Australia, New Zealand, Denmark, and the United States are rationing civilian meat consumption in order to assure sufficient supplies for military use and essential civilian consumption abroad. World meat supplies were estimated in May to be approximately 3 billion pounds short of essential requirements.

Canadian export commitments to the United Kingdom call for minimum exports of 500 million pounds of bacon and 50 million pounds of beef in 1945, or about 20 percent of Canada's total estimated production. Efforts are being made, however, to exceed these commitments in 1945, as in 1944, when exports to the United Kingdom totaled 802 pounds of carcass meat and

1/ A more extensive statement on this subject is available upon request to the Division of Foreign Information and Statistics, Office of Foreign Agricultural Relations.

34 million pounds of canned meats. Shipments of canned meat to liberated areas in 1945 may also reach about 110 million pounds. Canada is continuing to assume the responsibility of providing meat to other areas, such as Newfoundland and British West Indies. Exports of meat from Canada in 1945 are expected to be about the same percentage of total production as in 1944 when 34 percent of the output was exported.

Canadian civilian consumption of meat in 1945 is expected to average at a lower per capita rate than last year when supplies were large and storage facilities were unable to handle quantities that might otherwise have been carried over. Proposed rations, providing 2 pounds of meat per week, will reduce the annual consumption rate for meat (including edible offals) to about 130 pounds per capita, as compared with 149.1 pounds in 1944. These per capita rates include all quota users such as hotels and restaurants, special users, such as ships' stores and troop movements.

Wartime trends in meat output: Total meat production in Canada has increased sharply since the beginning of the war. Production in 1945 was 1,000 million pounds greater than in 1938. Pork production doubled between 1938 and 1942 with subsequent increases in 1943 and 1944. However, decreased farrowing in 1944 resulted in a decline of about one-third in inspected hog slaughterings during the first 5 months of 1945.

Beef and veal output showed only a moderate increase prior to the embargo of mid-1942 placed upon exports of live cattle, in order to retain beef for domestic consumption as replacement for bacon exported to the United Kingdom. The embargo, together with favorable feed and pasture conditions, brought an appreciable increase in beef and veal output in 1943 and 1944, with output in the latter year 42 percent above 1938. Production of mutton and lamb has not changed greatly during war years.

Exports to United Kingdom: Bacon from Canada has occupied an important place in the wartime diet of the United Kingdom. Agreements governing price and quantity of bacon shipments have been in effect between the two countries since December 1939. A new agreement covering the 4-year period, 1944-1947, calls for minimum shipments of 500 million pounds of bacon for the first 2 years with quantities for the succeeding years subject to later negotiations. On April 3, 1945, the two Governments reached an agreement providing that Britain will purchase and Canada will supply not less than 450 million pounds of bacon and ham during 1946.

An agreement for supplying surplus Canadian beef to the United Kingdom provides for minimum quantities of 50 million pounds (later increased to 60 million pounds for 1946) annually for 1944 and 1945, with Britain agreeing to take any quantities offered in excess of this figure. Actual shipments have been considerably in excess of these minimum figures. Exports in 1945 are expected to be at least 250 million pounds.

Based on reports from
the American Embassy, Ottawa, Canada.

COMMODITY DEVELOPMENTS

GRAINS, GRAIN PRODUCTS, AND FEEDSCANADIAN GRAIN PROSPECTS
BELOW LAST YEAR

The condition of grain crops in Canada at the end of June was below that of a year ago, according to an official statement of the Dominion Bureau of Statistics. Expressed as a percentage of the long-time average yield per acre, all grains except fall wheat appeared to be somewhat less favorable than on June 30, 1944. Private estimates, however, place the condition at a higher percentage than the official figure, indicating that the latter may not have taken full account of the beneficial rainfall received in the last few days of June. Prospects were officially reported to have improved considerably during the first week of July, especially in the important producing Province of Saskatchewan.

CANADA: Grain conditions as of June 30, 1945,
with comparisons

Grain	Condition June 30				
	Average	1943	1944	1945	
	1938-1942				
	Percent	Percent	Percent	Percent	
Fall wheat	97	82	97	97	
Spring wheat	101	115	119	101	
Total wheat	101	114	118	100	
Oats	94	88	98	82	
Barley	93	89	97	81	
Fall rye	90	84	91	78	
Spring rye	94	91	93	78	
Total rye	91	86	92	78	
	:	:	:	:	

From official sources.

ARGENTINE GRAIN ESTIMATES
REVISED

The 1944 crop of wheat and rye was smaller than formerly estimated, while oats was a little larger, according to the third official estimate. Wheat, as now estimated at 150,108,000 bushels, is about 6 million bushels less than the second estimate, and rye at 7,456,000 bushels compares with the former estimate of 10,216,000 bushels. The oats crop is now placed at 75,694,000 bushels, whereas the former estimate was 72,139,000 bushels. Barley production, reported at 26,377,000 bushels, shows little change from the previous estimate.

CHILEAN GRAIN SEEDING PROGRESSES

Preparation of the land and seeding of grain have been progressing normally in the south central and southern parts of Chile, which make up the main wheat zone, according to a recent report. About 80 percent of the country's soft wheat is grown in those areas. In the less important north central and northern areas, which produce most of the hard and durum wheat, unusually dry conditions had delayed seeding in many districts, and only about half of the average acreage had been sown in early June. The delay was not considered serious, however, and it was said that arrears could be made up if needed rains were received.

The 1944 wheat crop, according to the latest estimate, is placed at 33,296,000 bushels, of which 31,140,000 bushels are soft wheat. The total wheat production was, on that basis, about 3 million bushels less than the 1943 crop, despite some increase in the acreage. Though the current estimate is less than the first forecast, supplies are still considered more than sufficient to meet the country's needs in 1945.

Oats production is also placed at a lower level than was indicated by the first estimate, but little change has been made in the figure for barley. The latest estimate for oats is 7,163,000 bushels, or about 9 percent below last year's crop. The revision points to a possible reduction in the exportable surplus, which had been placed at a maximum of 20,000 metric tons (1,378,000 bushels). Though the total for barley shows little change from the preceding crop, a much higher proportion of the current crop is reported to be of malting grades.

VEGETABLE OILS AND OILSEEDS

ARGENTINE FLAXSEED PROSPECTS FAVORABLE

Argentine flaxseed sowings, aided by rains during the first week in July, is nearing completion. Trade sources anticipate an increase in acreage or at least 25 percent over last year when 4,693,000 acres were sown, although it will probably be several weeks before an official estimate is released.

The third estimate for last year's flaxseed production is 30,967,000 bushels, or 2.5 percent above the February forecast, but 50 percent below the corresponding estimate for 1943-44 when the harvest was about average.

FRUITS, VEGETABLES, AND NUTS

SOUTHERN HEMISPHERE DRIED-PRUNE PRODUCTION LOWEST SINCE 1941 1/

The 1945 preliminary estimate of dried-prune production in Southern Hemisphere countries is 7,900 short tons, compared with 9,400 tons in 1944 and 8,400 tons in 1943. This estimate, however, is 14 percent above the

CORRECTION: Page 33, last line, second paragraph should read that a further expansion in dried-prune production is expected in South America, instead of South Africa.

5-year (1939-1943) average and an 8-percent increase over the 10-year (1934-1943) average. This year's production estimate shows an increase only for Argentina, no change for Chile, and a decline of 50 percent for Australia and South Africa.

Production of dried prunes in Southern Hemisphere countries, especially Argentina and Chile, has shown a steady upward tendency during the past 15 years. In the British countries of Australia and South Africa, output has fluctuated widely during the same period with the 5-year average falling below the 10-year average in both countries. While no appreciable increase in production is expected in these British countries in the postwar period, a further expansion is expected in South Africa.

PRUNES, DRIED: Estimated production in specified countries
of the Southern Hemisphere, average 1939-1943, annual 1943-1945
(Rounded to nearest 100 short tons)

Year	Argen- tina	Aus- tralia	Chile	South Africa	Total four coun- tries	United States	Total specified countries
	Short tons	Short tons	Short tons	Short tons	Short tons	Short tons	Short Tons
Average 1939-1943	2,300	2,500	1,200	900	6,900	192,300	199,200
Annual - 1943	2,900	3,100	1,300	1,100	8,400	208,000	216,400
1944 <u>a</u> /...	2,200	3,600	2,000	1,600	9,400	163,200	172,600
1945 <u>b</u> /...	3,300	1,800	2,000	800	7,900	<u>c</u> /212,000	219,900

Compiled from trade and official sources.

a/ Preliminary.

b/ Preliminary estimate.

c/ California only.

Available exportable surpluses during this marketing year were mainly in Argentina and Chile, but small exportable surpluses also existed in Australia and South Africa. Postwar trade of the British countries is expected to follow closely that of the prewar period. In Argentina and Chile, domestic production is expected to take care of South American markets and later to expand into European dried fruit markets in competition with American and European prunes, a situation which will further complicate the United States problem, experienced before the war, of disposing of surplus prunes.

W. R. Schreiber

1/ A more extensive statement on this subject is available upon request to the Division of Foreign Information and Statistics, Office of Foreign Agricultural Relations.

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FRUIT PACK LOWER IN AUSTRALIA

The total 1945 pack of apricots, peaches, and pears in Australia is 2,080,000 cases of 24 No. 2-1/2's and is 10 percent lower than the 2,308,000 cases packed in 1944 but about equal to the 1943 pack. The apricot pack of 139,000 cases is the smallest since 1937 and is a result of crop failures in the main orchard areas. The peach pack totaled 1,293,000 cases, 4 percent below the pack of 1944 of 1,344,000 cases. The pear pack of 615,000 cases is 2 percent larger than the 1944 pack of 602,000 cases, but 13 percent above the 1943 pack of 709,000 cases. About 70 percent of the entire fruit pack will be required to meet Service demands, leaving less than 625,000 cases for civilians.

AUSTRALIA: Pack of specified fruit, average 1938-1942, annual 1943-1945

Year	Apricots	Peaches ^{a/}	Pears	Total
	: 1,000 cases:	: 1,000 cases:	: 1,000 cases:	: 1,000 cases:
Average -	:	:	:	:
1938-1942	306	1,593	738	2,637
Annual -	:	:	:	:
1943	216	1,158	709	2,083
1944	328	1,378	602	2,308
1945	139	1,327	614	2,080
	:	:	:	:

Official sources

a/ Beginning 1943, includes composite pack of pears and peaches, diced (mixed) as follows: 1943, 19,000; 1944, 34,000; 1945, 35,000 cases.

CANADIAN TREE FRUIT PRODUCTION DOWN

Prospects for Canadian tree fruit production for 1945 are excellent in British Columbia, but very poor in eastern Canada. The apple crop is estimated at 8,183,000 bushels, 52 percent below the 16,879,000 bushels produced in 1944, and is the smallest crop since 1926. The greatest reduction will occur in eastern Canada. Pear production is down sharply from last year's crop of 895,000 bushels to an estimated 557,000 for 1945. It will be the smallest crop since 1935. Other tree fruits are estimated as follows: Plums and prunes, 376,000 bushels, a 24 percent reduction; peaches, 1,313,000 bushels, also 24 percent reduction; and cherries, 172,000 bushels, a 36 percent reduction, but apricots, grown only in British Columbia, show an increase of 23 percent to 142,000 bushels.

Small fruits, unlike most tree fruits, show an increase over 1944. Strawberry production is estimated at 14,060,000 quarts, an increase of 31 percent over the 1944 crop of 10,736,000 quarts. Raspberries are estimated at 11,313,000 quarts, an increase of 22 percent over last year's crop of 9,259,000 quarts. The grape harvest is estimated at 67,839,000 pounds, an increase of 13 percent over the 1944 harvest of 60,235,000,

and will be the third largest on record, exceeded only by the crops of 1928 and 1942. Loganberries, grown only in British Columbia, show an increase of 20 percent or a crop of 1,688,000 pounds.

SUGAR, SIRUP, AND HONEY

PROSPECTS FOR CUBAN HONEY PRODUCTION

Cuban honey production for the 1945-46 season is unlikely to be much larger than the past season when commercial output, estimated from exports, was about 9 million pounds. Since 1942-43, when the crop was estimated at 14 million pounds, production has declined. Because of drought, production fell to 11 million pounds in 1943-44, and, owing to October hurricane damage to apiaries and to drought later in the year, output declined to 9 million pounds during the past year.

Normally, relatively dry weather prevails during the producing months, but since 1942-43 the producing season was drier than normal, reducing flower blooms and causing less production of honey per colony. Principal months of flower bloom are from November through May. In the next 6 months, bee colonies produce less than is needed for their own consumption.

Slightly over half of the honey produced commercially is purchased by 3 Habana dealers who clean it by use of a 120-mesh screen filter. The remainder is handled by dealers who employ a 50-mesh screen. Practically all of the commercial production is exported. Approximately 500,000 pounds per year is sold just before Christmas holidays for the manufacture of Turrón, a Spanish almond candy. Total consumption is probably around a million pounds a year, the remainder coming from non-commercial hives located on farms.

TOBACCO

DOMINICAN REPUBLIC'S TOBACCO OUTLOOK FAVORABLE

Higher prices and continued export demand have made the outlook for the Dominican Republic's tobacco industry extremely favorable. Growers are hopeful that purchases by Northern European countries, formerly large consumers of Dominican tobacco, will be resumed in the near future. Prices paid to growers in recent weeks have averaged 9 to 10 cents per pound for good quality leaf, considerably above the prices of a year ago. Practically all the present stocks of old-crop tobacco, about 9 million pounds, have been sold and are awaiting export. Prospects are that the demand will be heavy for leaf of the 1944-45 crop.

The 1944-45 crop of tobacco is estimated at from 25 to 30 million pounds. In 1943-44, due to drought conditions, the outturn was one of the smallest on record, amounting to between 6.8 and 7.7 million pounds.

Production during the 3 years 1940-41 through 1942-43 averaged 17.8 million pounds. Dominican tobacco consists of dark air-cured types, produced chiefly in the Cibao region, adjacent to the city of Santiago, in the northern part of the Republic. The crop usually is sufficiently large to provide a substantial quantity for export in excess of domestic requirements.

Consumption of leaf tobacco used in the manufacture of products ranges from 5 to 6 million pounds annually. Most of the consumption is in the form of cigars, cigarettes, and "andullo," a strong pipe tobacco of plug form, containing substantial quantities of molasses and other flavoring agents. About two-thirds of the leaf consumed domestically is used in the production of "andullo."

The Dominican Republic has long been an exporter of leaf tobacco. During the prewar period, 1935-1939, exports averaged 13.7 million pounds annually, chiefly destined to Germany, the Netherlands, and France. During the war, Spain and Spanish Morocco supplanted those markets as the principal importers of the Republic's tobacco. Exports during the 3 years, 1942-1944, averaged 8.7 million pounds annually. Imports of leaf, largely of United States origin, averaged only 61,000 pounds during the 5 years, 1940-1944. Imports of tobacco products are insignificant.

DOMINICAN REPUBLIC: Exports of leaf tobacco to specified countries, average 1935-1939, annual 1942-1944

Country	Average 1935-1939	1942	1943	1944
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
Germany	3,113	0	0	0
Algeria	1,128	0	0	0
Belgium	1,151	0	0	0
France	2,445	0	0	0
Netherlands	4,535	0	0	0
Switzerland	a/	225	164	1,224
Spain	603	626	11,268	322
Spanish Morocco	a/	5,541	4,511	0
Others	685	1,014	503	648
Total	13,660	7,406	16,446	2,194

From official sources and consular reports.

a/ If any, included with others.

LIVESTOCK AND ANIMAL PRODUCTS

ARGENTINE MEAT BOARD REVISES CATTLE PRICES

A single minimum price per pound to be paid by the frigorificos, has been established by the Argentine Meat Board, effective June 17, 1945, for all carcass beef within a given grade or quality. This eliminates the price discrimination previously in effect against heavy carcasses within grades at a time when the world meat supply and demand requires every encouragement for maximum production of meat.

The schedule, in effect prior to June 18, 1945, was established in 1943 (effective January 3, 1944) to encourage the production of medium weight carcasses for export. Four weight classifications for each grade of beef were recognized. The highest base price in each instance was for sides weighing under 375 pounds, while the lowest price within the grade was for sides weighing over 397 pounds.

The elimination of the price differential for carcasses of various weights is of especial interest to Argentine cattle producers at this time. Many droves of steers have attained weights that would have been penalized under the old Order, since it has been impossible to have them slaughtered because of labor difficulties in several of the frigorificos. It is pointed out that the Order represents a temporary suspension of the policy of producing carcasses of uniform weight and quality for export and that when the world scarcity of meat is over, Argentina will resume its traditional production and price policies.

ARGENTINA: New fixed prices at frigorificos per 100 pounds for steers, dressed weight, effective June 18, 1945, with comparison

Grade and description	Effective for direct		Effective at markets	
	arrival from ranches		(Liniers and Rosario)	
	Jan. 3, 1944	June 18, 1945	Jan. 3, 1944	June 18, 1945
	<u>Dollars</u>	<u>Dollars</u>	<u>Dollars</u>	<u>Dollars</u>
Chiller type (sides				
First grade J				
Up to 375 pounds	8.59	(all	8.48	(all
376 to 386 "	8.47	(weights	8.36	(weights
387 to 397 "	8.12	(8.50	8.02	(8.40
Average 397 "	7.46		7.35	
Average all weights				
Second grade U				
1st quality				
Up to 375 pounds	8.08 ¹	(all	7.98	(all
376 to 386 "	7.98	(weights	7.87	(weights
387 to 397 "	7.65	(8.00	7.55	(7.89
Over 397 "	6.99		6.89	
2nd quality				
Up to 375 pounds	7.55	(all	7.45	(all
376 to 386 "	7.46	(weights	7.36	(weights
387 to 397 "	7.15	(7.47	7.05	(7.36
Over 397 "	6.44		6.33	
Frozen type (superior) N				
Up to 375 pounds	7.35	(all	7.25	(all
376 to 386 "	7.27	(weights	7.16	(weights
386 to 397 "	6.96	(7.27	6.86	(7.16
Over 397 "	6.26		6.15	

Compiled from official sources and reports received from American Embassy in Argentina. Note: The new prices for T1, T2 and A grades suitable for the production of canned corned beef and dehydrated beef per 100 pounds are as follows: T1 \$7.19; T2 \$6.99; A \$6.79.

COTTON AND OTHER FIBERS

COTTON: Price of certain foreign growths
and qualities in specified markets

Market location, kind and quality	Date: 1945:	Unit of weight	Unit of currency	Price in: foreign currency:	Equivalent U.S. cents per pound
Alexandria (spot)	:	:Kantar	:	:	:
Ashmouni, F.G.F.	6-28:	99.05 lbs.	:Tallaris	: 30.50	: 25.47
Giza 7, F.G.F.	6-28:	99.05 lbs.	:Tallaris	: 40.00	: 33.41
Karnak, F.G.F.	6-28:	99.05 lbs.	:Tallaris	: 39.00	: 32.57
Bombay (July '45 futures):	:	:Candy	:	:	:
Jarila	6-29:	784 lbs.	:Rupee	: 420	: 16.14
Bombay (spot)	:	:Candy	:	:	:
Kampala, East African ..	6-29:	784 lbs.	:Rupee	: 850	: 32.66
Buenos Aires (spot)	:	:Metric ton	:	:	:
Type B	6-30:	2204.6 lbs.	:Peso	:1300	: 1756
Lima (spot)....	:	:Sp. Quintal	:	:	:
Tanguis, Type 5	6-30:	101.4 lbs.	:Sole	: 103	: 15.63
Recife (spot)....	:	:Arroba	:	:	:
Mata, Type 5	6-28:	33.07 lbs.	:Cruzeiro	: 77	: 12.68
Sertao, Type 5	6-28:	33.07 lbs.	:Cruzeiro	: 82	: 13.50
Sao Paulo (spot)	:	:Arroba	:	:	:
Sao Paulo, Type 5	6-29:	33.07 lbs.	:Cruzeiro	:Holiday	: -
Torreon (spot)	:	:Sp. Quintal	:	:	:
Middling, 15/16"	6-30:	101.4 lbs.	:Peso	: 88.75	: 18.01

Compiled from weekly cables from representatives abroad.